



Homeownership Capacity Data Collection System (DCS) User Guide

August 2020



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Introduction

The Homeownership Capacity Data Collection System (the “DCS”) is a web-based data collection system designed specifically for the Homeownership Capacity Program (the “Program”). Homeownership Capacity Grantees (the “Grantees”) are required to use the DCS to report on all households that enter the Program.

The Homeownership Capacity DCS User Guide outlines all the information Grantees will need to gain access, enter data, navigating the DCS for other tasks such as printing a summary of the Client data and sorting data to determine the date for subsequent Client follow ups, and how to report issues in the DCS.

All Program information on data collection, reporting, and documentation requirements related to the DCS can be found in the [Homeownership Capacity Manual](#) (the “Manual”) which is located on the [Minnesota Housing](#) website.

Chapter 1 – The Homeownership Capacity DCS

1.01 Gaining System Access and User Privileges

Grantees should contact [Minnesota Housing](#) in the following situations:

- A staff person (existing or new) needs access to the DCS;
- When a staff person who has access no longer needs access.

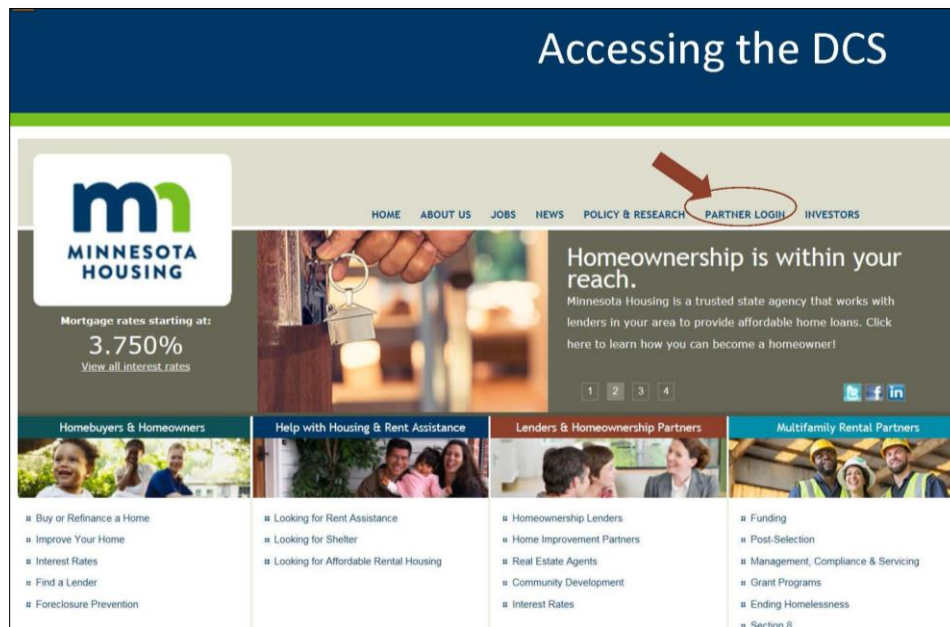
The Grantee's Program Manager should contact [Minnesota Housing](#) with the following DCS User information:

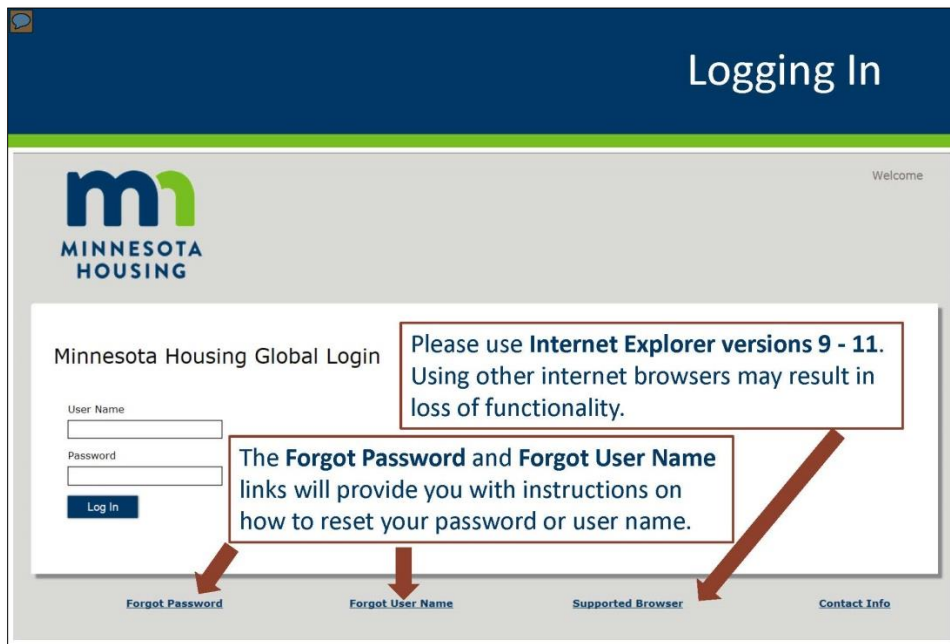
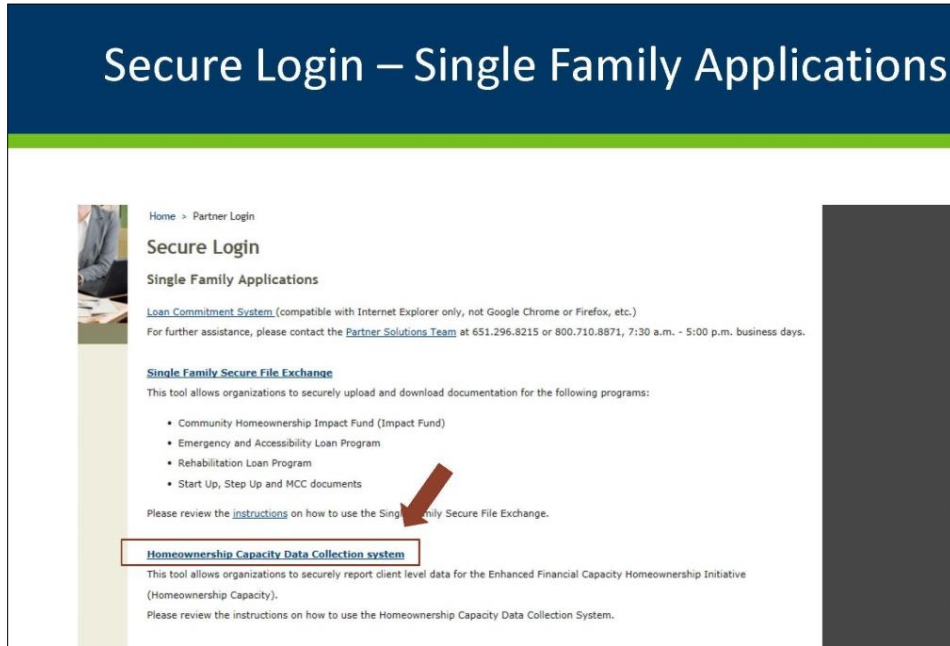
- Staff person's full name;
- Staff person's email address;
- Date to activate or deactivate access.

Once the Staff person (the "User") has access, they will receive an email with log in instructions. All Users have the same access privileges. This means that all Users within the Grantee's organization will be able to access and can update data on any existing Client in the DCS.

1.02 Accessing the DCS

Once the User obtained access to the DCS, follow the screenshots below on how to log in to the DCS:





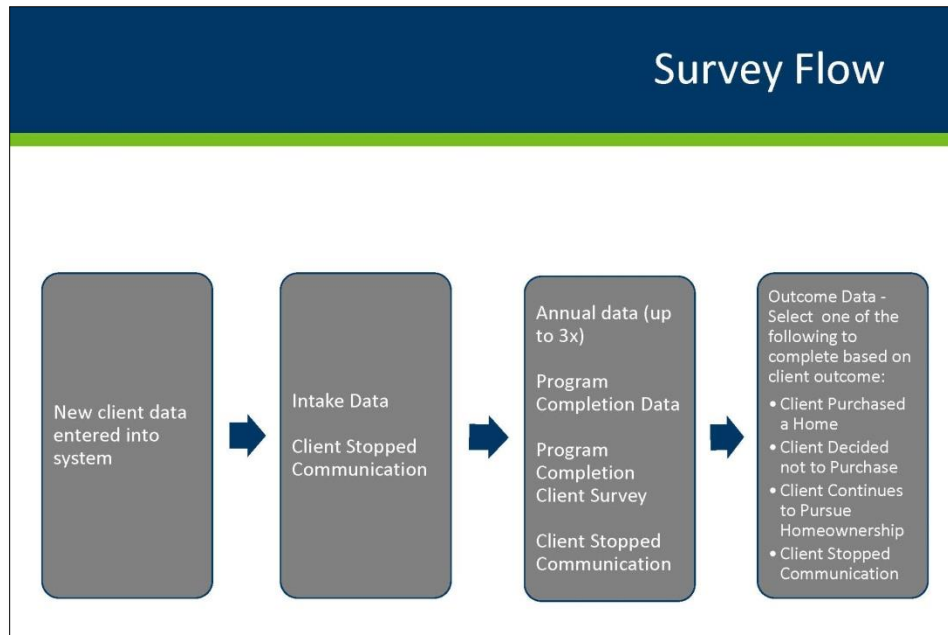
Once the User has logged in to the DCS, they may now complete any of the following:

- [Add new client and enter intake data](#)
- [Enter data for any subsequent stage](#) (Annual, Program Completion, Outcome, Client Stopped Communication)
- [Other DCS navigation](#)

1.03 Survey Flow

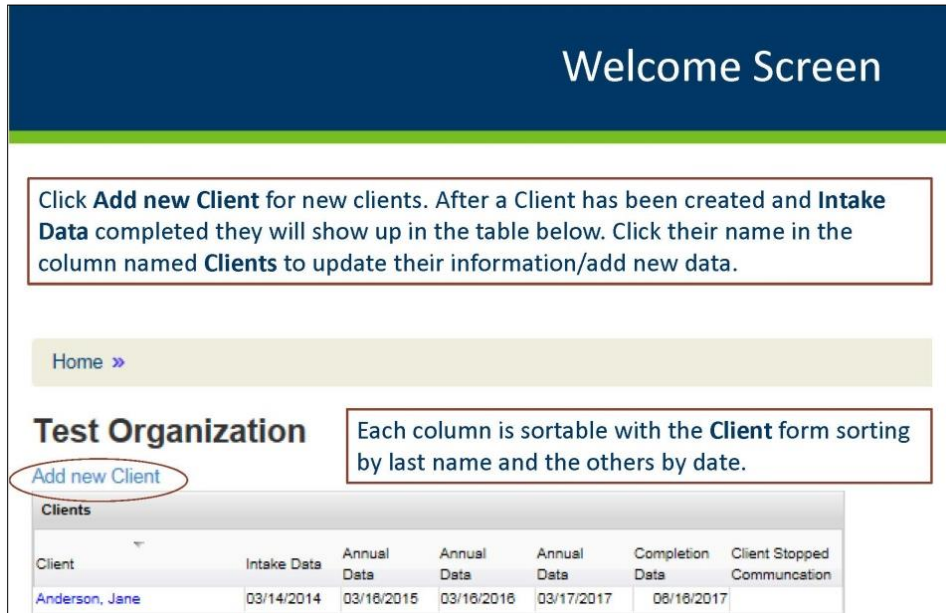
Once DCS access is gained, there are multiple stages where data may be collected. Each stage of the Client’s progress through the Program is called a Survey in the DCS. The DCS is designed to release subsequent Surveys only once the necessary information from the previous Survey has been submitted. For example, a User will only be able to access the Annual, Program Completion Data, Program Completion Client Survey or Client Stopped Communication Survey(s) once they have submitted all Intake data for that Client. All required fields must be completed before the User can successfully submit that survey.

See the [Homeownership Capacity Program](#) Manual (“the Manual”) for reporting requirements. See below for the survey flow established in the DCS.



1.04 Add New Client and Enter Intake Data

Once the User has determined the Client met eligibility requirements, the User may add a new Client and the Intake data. Follow the screenshots below:



Welcome Screen

Click **Add new Client** for new clients. After a Client has been created and **Intake Data** completed they will show up in the table below. Click their name in the column named **Clients** to update their information/add new data.

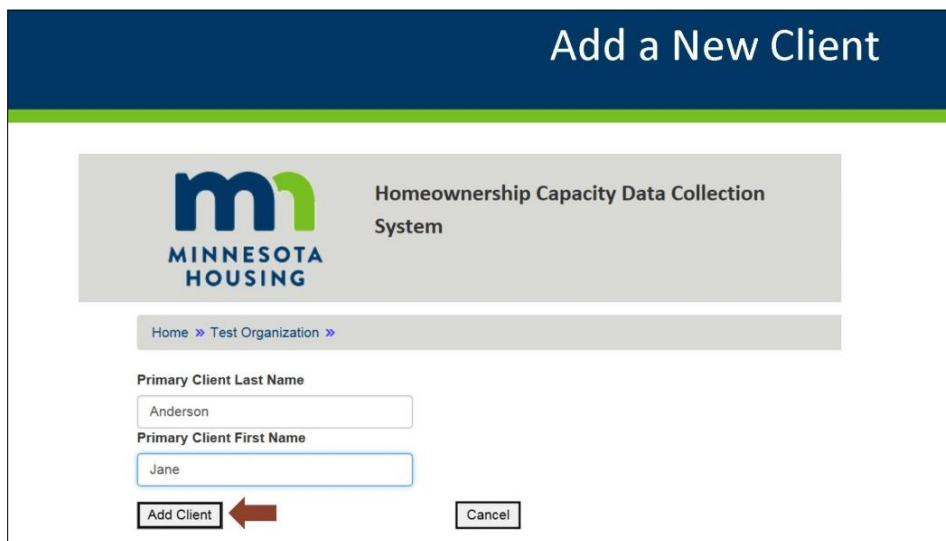
Home »

Test Organization

Add new Client

Each column is sortable with the **Client** form sorting by last name and the others by date.

Client	Intake Data	Annual Data	Annual Data	Annual Data	Completion Data	Client Stopped Communication
Anderson, Jane	03/14/2014	03/16/2015	03/16/2016	03/17/2017	06/16/2017	




Add a New Client

MINNESOTA HOUSING Homeownership Capacity Data Collection System

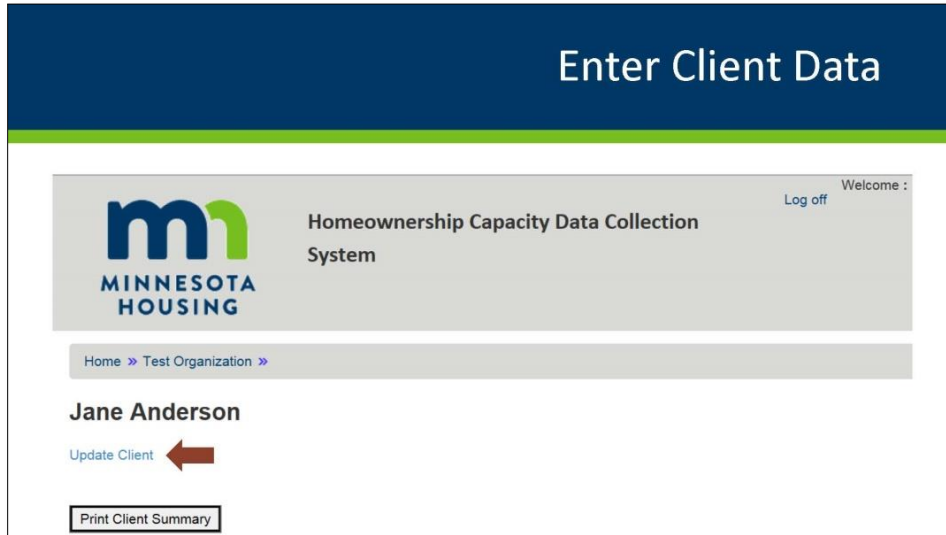
Home » Test Organization »

Primary Client Last Name
Anderson

Primary Client First Name
Jane

Add Client  **Cancel**

Enter Client Data



Homeownership Capacity Data Collection System

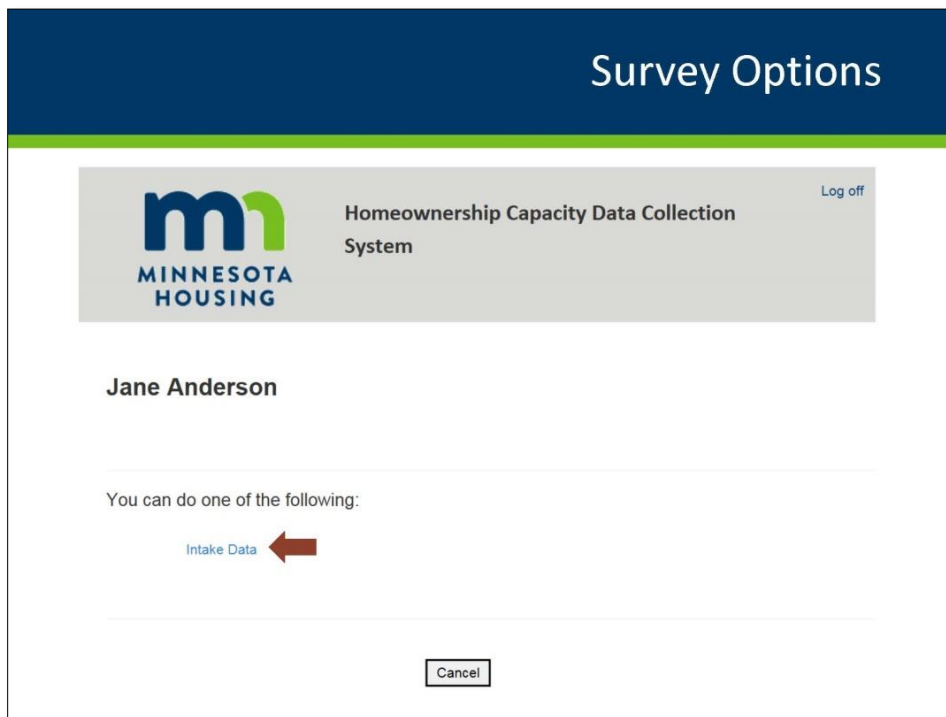
Home » Test Organization »

Jane Anderson

Update Client ←

Print Client Summary

Survey Options



Homeownership Capacity Data Collection System

Jane Anderson

You can do one of the following:

Intake Data ←

Cancel

1.05 Entering Subsequent Data

Refer to the [Manual](#) to ensure data is entered into the correct Survey. Once the User had added a new Client and Intake data, they may access any of the following Surveys:

- **Annual Data**
 - This Survey may be completed once annually up to three times.
 - This Survey does not need to be completed to access the Program Completion Data survey.

- **Program Completion Data**

- The Program Completion Client Survey will appear for completion.
 - This survey will become available once the Program Completion Data is submitted.
 - Users may submit this survey one time.
- Users will not be able to go back and enter Annual Data. Refer to the Manual to ensure data is entered into the correct survey.
- Users may submit this survey one time.

- **Outcome Data**

- This Survey will appear once the Program Completion Data and Program Completion Client Survey have been submitted.
- The following options for completion dependent on the Client's Outcome:
 - Client Purchased
 - Client Decided Not to Purchase
 - Client Continues to Pursue Homeownership

- **Client Stopped Communication**

- Refer to the [Manual](#) for the circumstances under which a Client should be entered as Client Stopped Communication.
- Once the Client is entered as Client Stopped Communication, the User will not be able to access any surveys.

To access this list of surveys, follow the screenshots below:

Survey History Screen

Homeownership Capacity Data Collection System [Log off](#)

Home » Test Organization »


Jane Anderson

[Update Client](#)

Survey History

	Question	Intake Data 3/14/2014 edit	Annual Data 3/16/2015 edit	Annual Data 3/16/2015 edit	Annual Data 3/17/2017 edit	Program Completion Data 6/16/2017 edit	Program Completion Client Survey 6/16/2017 edit
3	Program Year	2014-2015					
4	Data Collection Date	03/14/2014	03/16/2015	03/16/2015	03/17/2017	06/16/2017	06/16/2017


Update Client



Homeownership Capacity Data Collection System

Welcome :
Log off

Jane Anderson

 Intake Data:

You will see each Survey you have completed here with a green check

You can do one of the following:

Annual data
Program Completion Data
Client Stopped Communication



Select the Survey you would like to complete. In this case, **Annual data**.

Outcome Data – Client Purchased a Home



Homeownership Capacity Data Collection System

Jane Anderson

 Intake Data;
 Annual Data;
 Annual Data;
 Annual Data;
 Program Completion Data;
 Client Survey;

You can do one of the following:

Outcome Data - Client Purchased a Home
Outcome Data - Client Decided Not to Purchase
Outcome Data - Client Continues to Pursue Homeownership
Client has Stopped Communication


All Surveys Complete



MINNESOTA
HOUSING

Homeownership Capacity Data Collection System

Jane Anderson



Intake Data;

Annual Data;

Annual Data;

Annual Data;

Program Completion Data;

Client Survey;

Outcome Data - Client Purchased a Home;

You can do one of the following:

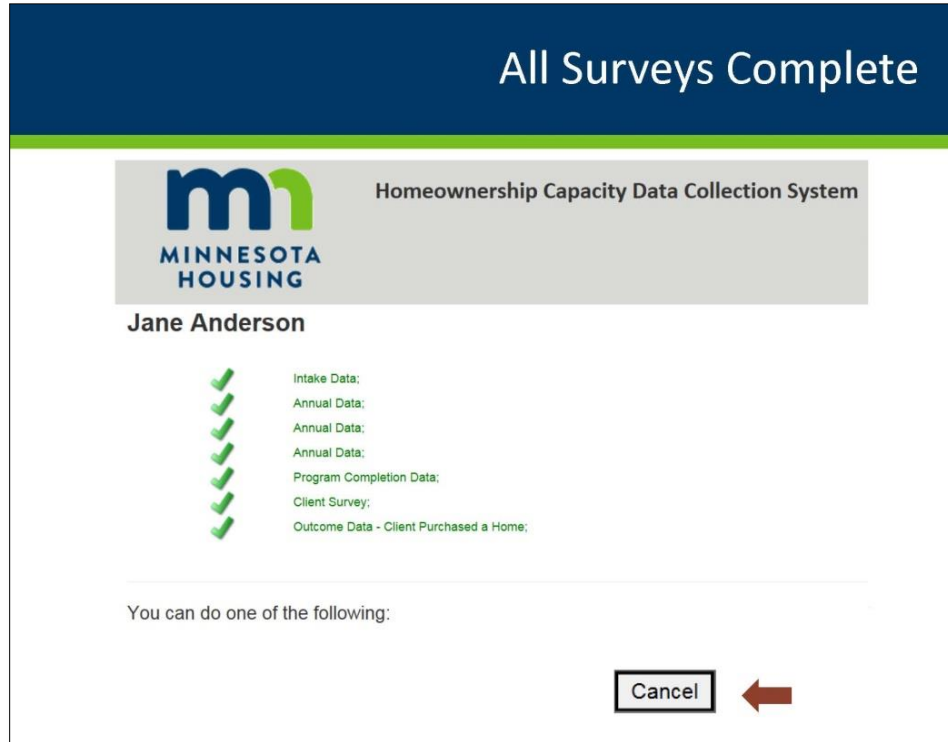
Cancel

The User will know they have completed all the required data entry when there are no additional survey options to select.

Chapter 2 – Other DCS Navigation

2.01 Returning to the Survey History Page

At any time, the User may click Cancel to return to the Survey History page for their Client.



2.02 Printing the Client Summary

At any time after Intake data has been entered, the User can print a summary of the Client data that has been entered in the DCS. This can be a useful tool to share with the Client to demonstrate progress.

Print Client Summary

Home » Test Organization »

Jane Anderson

[Update Client](#)

[Survey History](#)

The bottom of the **Survey History** Page has the **Print Client Summary** button, which provides a printable Client Summary Report.

Question	Intake Data 3/14/2014 edit	Annual Data 3/16/2015 edit	Annual Data 3/16/2016 edit	Annual Data 3/17/2017 edit	Program Completion Data 6/16/2017 edit	Program Completion Client Survey 6/16/2017 edit	Program Completion Client Survey 6/16/2017 edit	Client Purchased Home 8/31/2017 edit
3 Program Year	2014-2015							
4 Data Collection Date	03/14/2014	03/16/2015	03/16/2016	03/17/2017	06/16/2017	06/16/2017	06/16/2017	08/31/2017
5 Coach Name	Anderson							
6 Street	400 Sibley St							300 Sibley St
7 City	St. Paul							Anoka
8 Zip	55101							55126
9 County	Ramsey							Anoka
10 Banking Status	Banked							
11 1st Generation Homebuyer	No							
12 Barriers	Credit							
13 Secondary Barrier	Savings							

Print Client Summary

Print Client Summary

Home Ownership Capacity Data Collection System
Client Summary Report

Report Date: Friday, October 06, 2017

Primary Client: Jane Anderson
Program Year: 2014-2015
Client Address: 400 Wataasha St
First gen HIB: No
Race: African American or Black, White
Banking Status: Banked
Other Financial Services Received: Credit Repair

Secondary Client: Cecile Smith
City: St. Paul
of Adults in HIB: 1
of Minor Children in HIB: 2
Ethnicity: Non-Hispanic
Barriers: Credit, Savings
Time Receiving Services (Months): 2

Questions	Intake Data	Annual Data	Annual Data	Annual Data	Completion Data
Data Collection Date	03/14/2014	03/16/2015		03/17/2017	06/16/2017
Paid	\$700.00	\$950.00		\$950.00	\$950.00
Savings	\$1,000.00	\$2,400.00		\$3,500.00	\$5,000.00
Household Income	\$1,200.00	\$1,300.00		\$1,500.00	\$1,400.00
Age	30%	50%		50%	50%
Credit Score	600	700		750	750
Collections/Judgments	\$0.00	\$0.00		\$0.00	\$0.00
Credit Card/Unsecured Balance	\$10,000.00	\$5,000.00		\$4,000.00	\$2,000.00
Student Loan Balance	\$0.00	\$0.00		\$0.00	\$0.00
Secured Assets	\$15,000.00	\$13,000.00		\$9,000.00	\$7,000.00
Notes	Will work on credit score and savings	Continuing to pay down debts and working on budgeting		Client is doing well with budgeting	Client is looking for a home
Time spent coaching client (hours)	5	15		17	20

Pursuing Homeownership?

Client Pursuing Homeownership? Yes ☒ If not, why?

Client Survey

Data Collection Date: 06/16/2017

My understanding of the banking system: Stayed the Same

The frequency that I track my spending: Increased

My understanding of the importance of a spending plan: Increased

The frequency that the goal of improving my credit plays a role in my financial decisions: Increased

My understanding of how my credit affects my ability to get a loan: Increased

The frequency that the goal of saving money plays a role in my purchase decisions: Increased

My understanding of the importance that saving money plays in my ability to purchase a home: Increased

My ability to handle financial obstacles: Increased

The frequency that I make good financial decisions: Increased

Print Client Summary

The **Print Client Summary** button provides a printable Client Summary Report.

2.03 Returning to the Organization Page

The Organization page is where Users will be able to access the full list of all Clients.

Return to Organization Page

Homeownership Capacity Data Collection System

Home » Test Organization »

Jane Anderson

[Update Client](#)

[Survey History](#)

	Question	Intake Data 3/14/2014 edit	Annual Data 3/16/2015 edit	Annual Data 3/16/2015 edit	Annual Data 3/17/2017 edit	Program Completion Data 6/16/2017 edit	Program Completion Client Survey 6/16/2017 edit	Client Purchased Home 8/31/2017 edit
3	Program Year	2014-2015						
4	Data Collection Date	03/14/2014	03/16/2015	03/16/2015	03/17/2017	06/16/2017	06/16/2017	08/31/2017

2.04 Sorting by Client Names or Dates

The DCS allows any column data to be sorted by either in ascending or descending order. This allows a User to sort by a Client's name or by date to determine which Client's require subsequent data entry in the DCS.

Survey History Page

Test Organization

[Add new Client](#)

Clients

Client	Intake Data	Annual Data	Annual Data	Annual Data	Completion Data	Client Stopped Communication
Nguyen, Chi	03/15/2014	03/15/2015	03/15/2016		06/16/2016	
Dwarf, Doc	03/13/2014	03/16/2015	03/15/2016	03/15/2017	07/17/2017	

Test Organization

[Add new Client](#)

Clients

Client	Intake Data	Annual Data	Annual Data	Annual Data	Completion Data	Client Stopped Communication
Nguyen, Chi	03/15/2014	03/15/2015	03/15/2016		06/16/2016	
Dwarf, Doc	03/13/2014	03/16/2015	03/15/2016	03/15/2017	07/17/2017	

2.05 Find a Client Name

To find a Client name, push the “Ctrl” + “F” key on your keyboard at the same time. A box will appear to enter the Client name.

Client	Intake Date	Annual Data	Annual Data	Annual Data	Completion Data	Client Stopped Communication
Anderson, Jane	03/14/2014	03/16/2015		03/17/2017	06/16/2017	
Doe, Jane	10/06/2015	11/04/2016			06/15/2017	
Frye, James	03/08/2015					10/15/2015

2.06 Editing Data

Users do not have the ability to edit submitted surveys and must report edits to Minnesota Housing.

Common situations where edits are required:

- Data is entered incorrectly.
- The same Client is entered multiple times.
- A Client is entered as Client Stopped Communication but re-engages before the time that they can be counted as a new Client under the Program.

Users can request edits at any time. They do not need to wait until the end of the quarter. Users must report all errors by emailing HomeownershipCapacity.mhfa@state.mn.us with the following information:

- First two letters of the Client’s last name, first two letters of the Client’s first name
 - Do not include the Client’s full name.
- Intake date
- A description of the issue

Please see below for a few samples:

- **Data is entered incorrectly**
 - Client Name: Jo..., De...
 - Intake Date: 04/02/2018
 - The credit score at Intake needs to be changed from 642 to 624

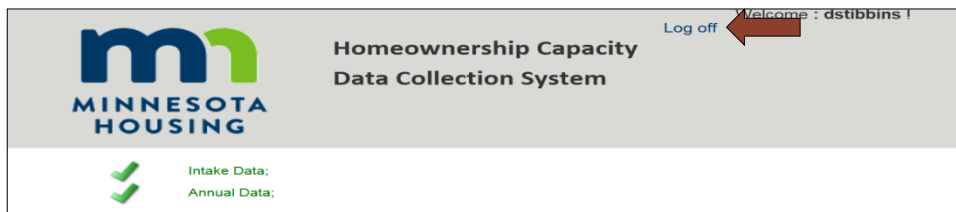
- Client Name: Hu....., Ma....
- Intake Date: 04/06/2018
- The Program Completion survey was submitted in error. Please remove this survey.
- **The same Client is entered multiple times**
 - Client Name: Va....., Br.....
 - Intake Dates: 01/02/2018 and 01/09/2018
 - This Client is a duplicate Client in the Data Collection System. Please delete this Client's 1/9/2018 entry.
- **A Client re-engages after being entered as Client Stopped Communication but before they can be counted as a new Client under the Homeownership Capacity program**
 - Client Name: An....., No....
 - Intake Date: 04/03/2017
 - The Client Stopped Communication survey needs to be removed as this Client has re-engaged and cannot yet be counted as a new Client.

Minnesota Housing program staff can complete most edits in the DCS. If the edit can be made by program staff, you will receive a response to your email once the edit has been completed.

Often edits need to be made with the assistance of Minnesota Housing's IT department. In these instances, a list is maintained and submitted on a quarterly basis. You will be notified via email if the edit requires this additional assistance. Once all edits are completed by IT, all contacts for your organization will receive a spreadsheet with each requested edit and the date the edit was completed. This will be sent via the Single Family Secure File Exchange (aka LeapFile).

2.06 Logging Out

To log out of the system, click Log Out in the upper right hand corner of any screen. After 15 minutes of inactivity, the DCS will automatically log the User out. If the User has not already submitted data, the data in any survey that is partially completed will be lost.



2.07 Reporting DCS Issues

To report any issues with the DCS, send an email describing the issue to HomeownershipCapacity.mhfa@state.mn.us. If any personally identifiable information (PII) on a Client must be included, only include the first two letters of the first name and the first two letters of the last name as well as the Intake date. The full Client name should not be included.